



ISAAC G. JOSEPH
SUPERINTENDENT

JEFFERSON PARISH PUBLIC SCHOOL SYSTEM

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PATRICIA A. ADAMS
CHIEF OF LEGAL SERVICES

February 20, 2017

Kathleen Allen
Ethics Administrator
Louisiana Board of Ethics
P.O. Box 4368
Baton Rouge, LA 70821

Re: *Request for Advisory Opinion*
Jefferson Parish Public School System

Dear Ms. Allen:

I write on behalf of Superintendent Isaac Joseph to request an advisory opinion as to whether, under the Code of Governmental Ethics, the Superintendent may accept an honorarium and payment of travel, meal, ground transportation and lodging costs in exchange for providing the consulting services described herein.

The Education Research & Development Institute ("ERDI") has extended an invitation to Superintendent Joseph to participate as a "consulting educational leader" at its bi-annual conferences. ERDI's stated mission is "to provide a forum for dialogue between outstanding educational leaders and committed corporate partners to shape products, goods, and services that will inspire excellence in education and enrich the achievement of all learners." See ERDI Mission Statement attached hereto as Exhibit A. ERDI fulfills this mission through annual conferences during which panels of school superintendents discuss topics of interest to ERDI clients and potential clients. A description of how the panels work is attached as Exhibit B. A list of corporate partners is available on the ERDI website at:
<http://www.erdius.com/clients.html>.

As a participating consultant, Superintendent Joseph would be expected to attend two conferences per year. For each session, ERDI would pay for lodging, meals, airfare and ground transportation. For his services, ERDI will also pay the Superintendent an honorarium of \$2,000 for each conference, plus an additional \$100.00 for serving as a panel chairperson. As noted in the attached mission statement, ERDI is not a publisher or manufacturer of educational materials and does not promote any client company.

Questions have been raised as to whether this arrangement would constitute a violation of La. R.S. 42:1111(A)(prohibited sources) or R.S. 42:1111(C)(payments for non-public service). We

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are, therefore, seeking an advisory opinion as to whether the payments contemplated herein are prohibited under these, or any other, provisions of the Code.

Please do not hesitate to contact me should you have any questions or if I can provide additional information.

Sincerely,

A handwritten signature in cursive script, appearing to read "Patricia Adams".

Patricia A. Adams
Chief of Legal Services
Jefferson Parish Public School System
504-296-8209
padams.legal@jppss.k12.la.us

**ERDI****Education Research & Development Institute**

The **MISSION** of **ERDI** is to provide a forum for dialogue between outstanding educational leaders and committed corporate partners to shape products, goods, and services that will inspire excellence in education and enrich the achievement of all learners.

ERDI exists to provide educational leaders the opportunity to influence the development, refinement and delivery of the products and services entering the K-12 educational setting so that those products and services can best meet the needs of all students.

ERDI provides a professional development growth experience for educational leaders and corporate partners. Leaders from these sectors engage in a dialogue to improve the products and services that enter schools.

ERDI provides educators and corporate partners an opportunity to keep abreast of the latest developments in educational theory, practice, management and technology.

ERDI provides both educators and corporate partners the opportunity to establish personal relationships that will foster excellence in education through discussion and inspired creativity which addresses unmet needs in schools.

ERDI is not a publisher or manufacturer of any educational materials. **ERDI** does not promote any presenting company. Educators are not expected to purchase any products from presenting companies. There is no intended or implied influence with a district because of the educator's participation in **ERDI**.

*ERDI - Education Research & Development Institute***HOW ERDI WORKS FOR YOU**

1. What is a panel?

A panel is a three hour session where the client, represented by one or more people, receives candid feedback on a specific topic from five Chief Executive Officers (CEOs) from school districts across the United States. It is understood that all topics discussed are confidential. Potential new clients for ERDI usually attend one set of panels as observers to enable them to talk to client members and superintendents to help in the decision making process of becoming a client of ERDI.

2. Who sets the agenda for the panel?

The agenda is set by the client in consultation with the superintendent chairing the panel. Thus, the two key agenda and process setters are the contact person from the client company and their ERDI chairperson. The key to a successful panel is careful planning and clearly stated and understood expectations by both parties.

3. What types of things should/could be included in the pre-plan planning?

- i) Selection of a clearly articulated, focused topic for the panel. For example, a marketing plan for a specific commodity or service.
- ii) Identification and distribution of any material to be provided to the panel members prior to the sessions.
- iii) If desired, development and distribution of a questionnaire to the ERDI panel members in advance of the session. If the information requested is required prior to the panel then the questionnaire needs to be distributed, collected and collated well in advance of the panel.
- iv) Identification of any special facilities and/or audio visual equipment required for the panel. For example, the client may want to video tape the panel. This is possible at additional cost to the client.
- v) If desired, indication of specific panel members desired by the client. These requests reflect regional or size of district desired by the client. As the client gets to know the superintendents better there is a tendency to want to identify specific superintendents. These requests will be considered and satisfied to the greatest extent possible.
- vi) Pre-determining whether the client is prepared to have other companies

observe their panel. Some topics may be too sensitive to allow observers.

4. How do the panel members know what the client expects during the panel session?

Assuming good communication and planning by the client contact and the panel chairperson, the following information/activities will assist the panel members:

- i) An agenda prepared in advance and circulated to all participants.
- ii) Distribution of materials to describe the company and the service or commodity to be focused on during the panel.
- iii) Distribution of a questionnaire, if this is part of the process.

5. How does a panel function?

- i) To enable the client to focus on the content, not the process, the panel should be chaired by the ERDI consulting superintendent.
- ii) The chairperson calls on the ERDI members to introduce themselves and briefly describe their school districts.
- iii) The chairperson introduces any observer companies present.
- iv) The chairperson or client contact introduces the agenda.
- v) The chairperson leads the client and ERDI team through the agenda.
- vi) Allowance is made for a break of 10 minutes after approximately half way through the session.
- vii) Time should be built in to sum up the session, determine any follow-up activities required and/or identify and further steps to be followed.
- viii) It can be effective to provide any observers present an opportunity to comment.
- ix) Wrap-up by the client contact and the Chairperson.